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IG SURVEY OF THE OFFICE OF TRAINING

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OUTLINE FOR
OFFICE OF TRAINING REPORT

I. Office of Training

    A. General

    B. Monetary Expenditures for Training

    C. Quality of Training

    D. Major Problems of Training which must be Met.

II. Intelligence Training

    A. Overt

    B. Covert

        1. Basic Courses
        2. Advanced Courses
        3. Covertly Given Training

III. Support Training

    A. Language

    B. Management and Clerical

IV. Programs

    A. Assessment & Evaluation

    B. External Training

    C. Junior Officer Program

    D. Orientation & Briefings

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VI. Organization & Management of OTR

VII. Conclusions

VIII. Recommendations

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JUN 22 1954

MEMORANDUM FOR: Deputy Director (Administration)

SUBJECT: Report of the Inspector General dated 21 April 1954, on the Office of Training

The following comments are offered with respect to the indicated recommendations contained in the subject report:

Recommendation No. 1. We agree that the T/O should be cut to the ceiling. The survey now being conducted by the Management Staff will accomplish this.

Recommendation No. 2. We agree with the basic objective of this recommendation, i.e., reduction in the number of staffs and divisions reporting to the Director of Training. We do not agree with proposals for specific transfers of responsibility such as the OTR Library to the Plans and Research Staff nor do we agree with the proposal to create a Support Training Division to be composed of management training, junior officer training, etc.

The attached Management Staff interim report, which has the concurrence of the Director of Training, provides for three staff elements, namely, Plans and Research, Assessment and Evaluation, and Administration and Support. At the operating level we provide for four major elements. These are Basic Training, Intelligence Training, Operations Training, and Area and Language Training.

This we feel accomplishes the primary objectives of the Inspector General with respect to his recommendations on organization of the Office of Training.

Recommendation No. 3. This has to do with grades and proposes that the Director of Training be designated Assistant Director for Training in order to be in consonance with other similar major elements. We agree that organizationally the Office of Training should be, and is, on the same level as the Offices of Personnel and Communications. However, we believe that the head of the Office can operate equally well under either title. The present title is well known and the Director of Training has expressed to us a desire to continue operating under that title.

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Recommendations 5, 6, and 7. We are not as yet prepared to comment on the proposal to establish a committee to review all Agency training not currently under the supervision of OTR. This problem will be covered by a later phase of the survey now being conducted by the Management Staff.

Recommendation No. 9. We do not agree that OTR should be responsible for the coordination of the preparation of all manuals on doctrine. We believe that the responsibility for the preparation and coordination of such manuals must be with the element having responsibility for the accomplishment of the function covered by the manual where there is such an element. However, we believe that OTR should have the responsibility for collaborating with such staffs and operating elements in the preparation of manuals on doctrine.

Where there is a training need for a manual on doctrine on a subject that is not the specific responsibility of an Agency organizational element, we believe that consideration should be given to the assignment of that responsibility to the Office of Training. This problem will also be covered by a later phase of our survey, at which time definite recommendations will be made.

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Chief, Management Staff

Enclosure
     MS Interim Report

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The Director, Office of Training   22 JUN 1954

Chief, Management Staff, DD/A

Interim Report re: Management Survey of Office of Training

1. PROBLEM:

To study the organization, functions and operations of the Office of Train-
ing and recommend corrective measures which will reduce the present ad-
ministrative demands upon the Director.

2. ASSUMPTIONS:

This survey team assumes the privilege of identifying and delineating
problem areas, arriving at conclusions based on the facts and situations
disclosed during the survey, and of propounding corrective recommenda-
tions, without regard to the fact that other elements of the Agency
have surveyed the Office of Training and arrived at findings which may
or may not agree with the recommendations of this survey.

3. FACTS BEARING ON THE PROBLEM:

a. A preliminary study of the Office of Training, including a conference
with the Chief of each element and staff in the organization, indicates
that the problems of OTR can not be satisfactorily resolved until the
organization of the Office is readjusted and its training and support
elements regrouped in a manner permitting the delineation of fields of
interest, placement of responsibility, and delegation of authority to
each echelon.

b. This interim report is submitted to present this situation, with a recom-
mended solution, to the Director of Training for his concurrence before
going further into a detailed study of the internal organization, func-
tions, responsibilities, authorities and staffing within each individual
element of the Office.

c. Discussions, conclusions and recommendations in this report are restricted
to the question of over-all OTR organization, channels of command, fields
of responsibility, obvious locations for delegation of authority, redis-
tribution of courses to conform to fields of interest, and the disposi-
tion of certain of the present staff elements of OTR.

d. Certain subjects, common to management studies and pertinent in this in-
stance, are not included in this preliminary report. A non-concurrence
of D/OTR in the proposed basic organizational adjustment may materially

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alter the scope and extent of further work required from the survey team and could effect the possibility of solutions to problems. Examples of subjects to be considered in the second phase of the survey are:

(1) Functions and Responsibilities of elements, staffs and individuals.

(2) Staffing requirements and patterns.

(3) Delegations of authority to Divisions, Schools and individuals.

(4) Channels of command, direction, staff guidance and liaison.

(5) Internal procedures and controls.

(6) Internal coordination.

(7) Clarification of OTR responsibilities and authority concerning overseas training, courses conducted elsewhere in the Agency, etc.

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(8) Operational problems involving the internal conduct _____

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(9) Matters concerning space equipment, support, etc.

(10) Clarification of relationships where cooperation, correlation or coordination with other Agency elements is necessary.

(11) Budgetary-fiscal controls to assure that D/OTR is adequately protected in his responsibility for the expenditure of OTR funds.

(12) Other problem areas disclosed by the survey.

4. DISCUSSION:

a. The findings of this report are based on, (1) reports of previous surveys conducted in OTR, (2) the present organization and functions of the Office, (3) historical material made available by the Executive Officer, (4) the subjects and content of courses and programs now offered, and (5) conferences with the Chief of each major OTR component and staff.

b. The Office of Training is of such size and complexity as to require a clearly defined secondary command structure, and adequate definition of the responsibilities and authorities of the second and third levels of command, in order to provide for normal day to day operations without the attention of the Director. The present organizational structure reflects twelve (12) operational and staff elements, plus the three (3) elements

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_____ plus a Deputy and an Executive Officer, who have direct access to the Director on any or all matters. Discussion with Division Chiefs reveals a uniform belief that each is responsible directly to the

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Director and each evidently feels that he has unlimited access to the Director on any phase of his operation. This condition speaks well for the personal relationships existing within the Office; it is also evident that it creates an unbearable demand upon the Director and permits too little time for the major considerations of the Office.

c.   The Deputy Director considers his responsibility to be mainly in the training phases of the operation, primarily with the Clandestine Services (Covert) type of training. He is concerned with the selection, recruiting and qualification of instructors. Full responsibility and authority for the training phase of the mission do not, however, appear to be vested in the Deputy, nor is there any evidence that problems brought to the Deputy are not also taken directly to the Director.

d.   The Executive Officer considers his primary responsibility to be in the administrative and support aspects of the operation, both in headquarters and the Training Center. As in the case of the Deputy, there appears to be no grant of full authority. There is evidence that many of the normal problems in these fields are taken directly to the Director.

e.   The present organization reflects two Staff elements and two elements called Staffs which actually are mis-named. The last two elements are "services" rather than "staffs" in the usually accepted meaning of the term.

(1)   Plans and Research Staff, though not attached directly to the Office of the Director, purports to have one element which serves in such capacity. Another element performs staff functions pertinent to the operation of the training side of the Office.

(2)   The Assessment and Evaluation Staff, by the nature of its functions and responsibilities, has a combination of the characteristics of a staff element and a support element. This element, through its Assessment Branch, expends a very considerable amount of time in placement evaluations for other components of the Agency.

(3)   The titles Administrative Staff and Instructional Services Staff present a loose application of the term. These elements and their components are active support groups. It is believed that their relationship to the Office can be correctly reflected by identifying them as support elements. Their internal organization appears to properly centralize those administrative and support functions which are necessary to the operation of OTR. Certain questions concerning functions, scope of responsibility, authority, appropriate titles, etc., can be resolved as the survey is extended to its second phase. Discussion with the chiefs of these components discloses that they, as well as certain leaders and personnel of the sub-units, report directly to the Director on many matters.

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f. The present organization of the Office shows eight training divisions directly responsible to the Director. They are:

(1) Intelligence Training

(2) Management Training

(3) Language Training

(4) Basic Training

(5) Specialized Training

(6) Orientation and Briefing

(7) Junior Officer Training

(8) Project Training

The first five divisions, 1 thru 5 above, develop and conduct scheduled courses at headquarters. The last three divisions, 6 thru 8 above, differ in mission and operation from the others since they (1) perform or administer orientations and briefings representing the Agency more than OTR; (2) conduct off-campus tutoring and (3) supervise specialized on-the-job career development, none of which involve formalized on-campus courses.

g. The five training divisions, paragraph f-1 thru 5 above, are a consolidation from a former set-up in the Office which provided duplicate instructional facilities for the training of personnel from the so-called OVERT and COVERT elements of the Agency. The present structure does not permit clear delineation to divisions concerning their fields of interest and extent of subject coverage in administrative, orientation, intelligence, and other fields. Discussions with the Chiefs of these divisions indicates a similarity in courses, both in titles and subject matter, particularly in the basic or elementary phases, which appears to be an unnecessary duplication. It also appears that, where two or more divisions are offering courses in the same or similar fields, one division chief is only aware in a general sense of the content of similar courses offered in other divisions. This condition could result in duplication in the number and content of courses beyond that which might be justified in the interest of compartmentalization.

h. The present Orientation and Briefing Division is exactly what it's name implies. It is not in the same category with the strictly training divisions. Orientations conducted by the Division are for all Agency employees, including personnel from outside the Agency in many instances. It appears that such sessions are in the nature of Agency "personnel or public relations", rather than training as conducted by the Office of Training. Briefings are also given to high level officials of the U.S.

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and other governments in which the Division is representing the DCI, DDCI or one or more of the DD's. The same is true of presentations made to outside groups in other governmental, quasi-official and private agencies, much of which is strictly Agency public relations and has little connection with the mission of the Office of Training.

i. The Junior Officer Training Division consists of a staff of three OTR personnel whose function is in the nature of specialized career management for a corps of prospective careerists. No formalized courses are involved. The program consists of the selection of promising candidates and the supervision of their placement and on-the-job training. It appears that this element could be justified in the Training Office, the Agency Personnel complex, or of the Agency Career Service system, with sound arguments for each. The Division carries [____] slots for the JO careerists while in an on-the-job training status. These slots are non-productive to OTR, since JOT's are not a part of the working staff of the Office.

j. The Project Training Division is actually conducting a highly covert tutoring service and is not comparable to the other training divisions. Tutoring is on a strictly personal basis, is all carried on off-campus, and formalized presentations are usually precluded.

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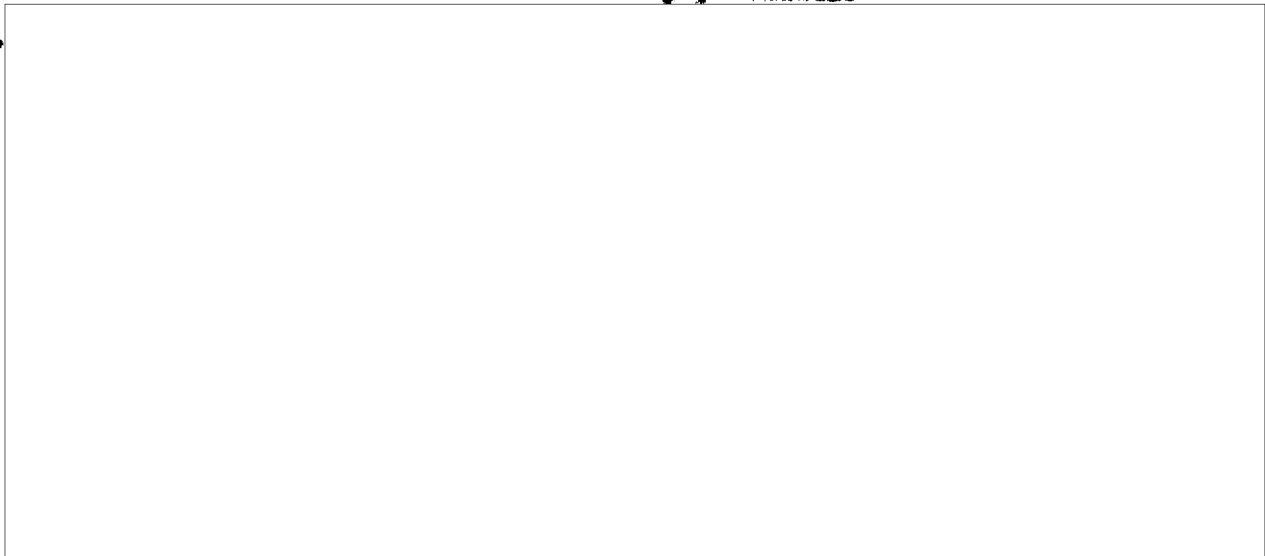
l. There will be problems in the internal organization of the proposed staffs and divisions concerning staffing adjustments, procedures, the development of statements of responsibility and authority, and the laying on of lines of command, after the basic pattern of the Office is approved. These problems will be resolved in the second phase of the survey as it is extended into the divisions and branches.

m. The Office of Training is faced with a number of problems in its relationship to other components of the Agency and in matters of overall

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Agency training policy. Many of these have been the subject of previous study, conferences and memorandums. This survey gives priority to the internal problems of OTR. When these are resolved, recommendations concerning extensions to Agency training policy and clarifications in OTR external relationships can be developed. Some problems in this category are:

(1) The furnishing of appropriate personnel by DD/P, DD/I and DD/A as students for courses which have been requested.

(2) The obtaining of qualified instructor personnel from the operating components, either on rotation to OTR or for special assignments, where experience and technical know-how are required.

(3) The need for Agency policy and procedure which will assure a more uniform student load.

(4) The need for a device in the classification process which would permit the rotation of qualified operating personnel to OTR "in grade" and a career plan to assure their orderly return to the operating field upon completion of their OTR tour.

(5) The need for Agency policy concerning the extent of training which should be required of new employees before entry on any active assignment and/or before movement overseas.

(6) The need for clarification concerning the scope of responsibility and authority which should be vested in OTR in connection with organized training conducted by other components of the Agency in headquarters and overseas.

5. CONCLUSIONS:

a. The Office of Training is performing a mission somewhat comparable to a college or university and its organizational pattern and functional distribution should conform to an academic type structure.

b. The problem of organizational structure and concept within the Office of Training is considered to be of primary importance. Upon the resolution of this question depends the solution to many of the internal and external problems of the Office. With the proposed structure and concept approved by the Director of Training, the survey can proceed.

c. The present structure of OTR does not provide an adequate secondary level of command. Twelve (12) headquarters staff and training elements, plus a Deputy Director and an Executive Officer, report directly to the Director. 25X1 In addition, three (3) _____ operation are also responsible to the Director. There is a screening responsibility located in the Executive Office for the administrative and support phases and in

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the Office of the Deputy Director for certain phases of the training operation. However, discussion with the chiefs of the divisions and staffs reveals that they consider themselves to be directly responsible to the Director and that they, and in many cases their subordinates, may contact the Director personally on any matters. Whether this situation results from necessity or design is beside the point. It indicates an excellent relationship between the Director and his principals but it creates an unbearable demand upon the Director.

d. The Office of Training falls into three logical organizational groups; namely, the training groups, the administrative and support elements, and the assessment and evaluation activity. The need for limited staff support is indicated and will be discussed separately.

e. The fields of interest in training, the courses offered, and the responsibilities for off-campus training, lend themselves to logical groupings. "Schools" can be organized and their responsibilities, interests and authorities clearly delineated, and thus permitting a logical grouping of like subjects and like activities. The present organization, a compromise from a former structure which had duplicating elements serving the covert and overt requirements, does not entirely eliminate duplication in courses and subject matter. Compartmentalization and presentation of covert material can be accomplished under the proposed "school" type organization through the arrangement of courses, offering basic and intermediate courses of interest to all personnel and advanced courses for specialized personnel.

f. The present Administrative Staff and the Instructional Services Staff, with some minor realignment of functions and emphasis, appear to be adequate and necessary. The activity of these elements should be the direct responsibility of the Executive Officer.

g. The present Assessment and Evaluation Staff should be continued approximately as-is but should be reflected in the organization in such a manner that its relation to the Director and to the training and support elements is clear. This element functions in an advisory capacity to the Director and to the training components; it has neither command nor operational responsibility. The assessment activity also provides service to other Agency components, mainly DD/P, and this fact should be recognized when evaluating the total number of T/O positions charged to the Office of Training.

h. The proposed concept of organizational structure for OTR recognizes a need for a small but highly qualified staff element, having a very specific mission.

i. The Orientation and Briefing Division is primarily an Agency personnel and public relations element, having only a minor relationship to the mission of the Office of Training. It operates in very close relation

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with the FCI, the DDCI and the DD's. In most of its activities it is
directly representing the Agency or the DCI or his principal subordinate
officials. The element would be more properly located if it were attached
as a specialized staff to the DDCI.

j. OTR is responsible for several types of off-campus training, e.g., the
JOT Program, specialized tutoring of covert agents and foreigners and
training authorized at outside agencies and public institutions. These
activities require relatively small staffs to supervise each program,
and they should be assigned to major elements having a common field of
interest. Their present divisional status is not justified.

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(3) The JOT Trainee slots are completely non-productive insofar as the Office of Training is concerned, since trainees occupying these slots are performing in an on-the-job status in the operating components of the Agency.

m. This survey of the Office of Training should be conducted in the following logical stages, with interim reports to the Director upon the completion of each phase or as requested:

(1) Study and recommendations concerning the over-all organization of the Office; lines of command, responsibility and authority; fields of interest; missions and functions of major elements.

(2) Study and recommendations concerning the internal organization of each major and minor element; exact delineation of fields of interest, functions, procedures, reporting systems, etc.; outlining lines of authority, coordination and responsibility; resolution of problem areas; justification of T/O's, etc.

(3) Identification of Office of Training problems in its relationships with the Agency as a whole or with other Agency components, such as;

(a) Need for firm policy concerning responsibility for supervision of overseas training, training conducted by other components, firm requirements regarding preparatory training for all overseas personnel, etc.

(b) Need for firm policy concerning the rotation of qualified instructor personnel between the operating components and OTR, with adequate administrative devices to provide for "grade" differentials and slots.

(c) Improvement in the system for determining training requirements, providing of an adequate, appropriate and qualified student body, etc.

6. RECOMMENDATIONS:

a. That the proposed organizational structure for the Office of Training (Tab A), be approved, including titles of elements, distribution of fields of interest within the training groups, the placement of a staff element, and the proposed command and coordination lines [   ]   25X1

b. That the Orientation and Briefing activity, and the three positions and incumbents involved, be transferred to the staff of the DCT.

c. That, upon the acceptance and approval of the foregoing recommendations and the proposed organizational structure, this survey proceed according to the following phases:

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First: Assist in the development of functional statements for each of the major elements and staffs to assure strict conformance to the concept proposed herein as it concerns delineation of fields of interest, responsibility, authority, coordination, support, channels of command and supervision, and staff advisory capacities; assist and/or advise, as necessary, in the adjustment and inter-exchange of T/O slots from the present to the proposed structure; otherwise assist in the transition as requested.

Second: Survey each element of OTR to:

(1) Assist in the development of functional statements along the lines outlined above for the major elements.

(2) Determine the T/O requirements for each element.

(3) Assist in the development and coordination of procedures, policies, etc.

(4) Identify, and propose solutions to, individual problems pertinent to each element.

(5) Develop such flow charts, diagrams, and other visual aids, as may seem necessary to clarify for all personnel the lines of command, staff responsibility, areas of interest, authority delegations, etc., in order that the proposed organization may be understood by all executive, supervisory, support and administrative personnel.

Third: Upon completion of necessary adjustments within the Office of Training, identify and define those problems of the Office which involve the need for Agency policy, direction or regulations and their annunciation or clarification, or which concern working relationships with other Agency components; and assist in the development and presentation of appropriate solutions.

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Chief, Management Staff

ATTACHMENT:

COMCUR:

Tab A - Proposed Organisational Structure OTR

/s/ __Matthew Baird__   23 June 1954
     Director of Training   **Date**

*Except that recommendation 6.b. should involve transfer of only two positions and their incumbents.

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Outline of Plan for <u>Second</u>
<u>Phase</u> of Survey <u>of</u>
<u>Office</u> <u>of</u> <u>Training</u>

The following is an informal statement of the major steps, in their proper order, believed to be necessary in conducting the <u>Second</u> <u>phase</u> of the survey of OTR:

1. Survey "Schools" to establish:

    a. Firm list of Courses - define exactly the Field of Interest.

    b. Write (or modify) Functions, picking up the technical and professional implications now assumed by the Training Support Staff.

    c. Assist in (or coordinate) the shift of personnel from present Divisions to the four new schools.

    d. Work up justifications for each School T/O.

    e. Consider possibilities for data to be required for a periodic operations report to the Director.

    f. Assure that Chief and all principal subordinates understand the new <u>channels</u> <u>of</u> <u>command</u>, and lines of coordination with other OTR elements and with Agency elements.

    g. Note problems disclosed by the survey for later treatment.

    h. Check necessity for written procedures and encourage the preparation of any that appear necessary.

    i. Check the need for specific delegations of authority - other than those implied in the functions - and refer to Director.

    j. Check Position Descriptions.

    k. Include with "Schools" the Field and Covert elements.

2. Survey P&R Staff and A&E Staff to:

    a. Modify functions.

    b. Assure understanding of working relationships in the new structure.

    c. Verify and justify the T/O's.

    d. Check for Position Descriptions.

e. Consider availability of data for periodic operations report.

f. Question need for formal procedures.

g. Note problems disclosed and need for any specific delegation of authority.

3. Survey Admin & Support Staff elements - Headquarters first and Isolation second:

a. Modify Functions - shift professional and technical training aspects (now assumed by Support Staff) to the appropriate "Schools".

b. Verify and justify T/O's.

c. Check position descriptions.

d. Check workloads and measurable operations.

e. Examine procedures and recommend written procedures where necessary.

f. Devise operations report to Director.

g. Study problems disclosed.

25X1   h. Assure that all personnel understand their position in the new concept -

i. Check need for specific delegations of authority.

j. Check for overlapping and duplication

(1) Internal

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(3) With other Agency components.

k. Assure adequate Budget-Fiscal control to protect the Director from over-obligations.

l. Check Personnel Section for duplications or unnecessary personnel records.

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a. Evaluate present organizational structure in the light of the new concept.

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b. Survey each element for:

(1) Workloads

(2) T/O utilization and justification.

(3) Overlapping and duplicating effort.

(4) Measurable operations.

(5) Functions and procedures.

(6) Problems and solutions.

(7) Reportable operational data.

(8) Need for further delegation of authority.

(9) Assure understanding of new concept by <u>all</u> FTB personnel

Covert Training Element

a. Survey as for other OTR elements to the extent possible under the circumstances.